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1986 Review of the Music Industry and Amateur Music Participation

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FROM THE PRESIDENT

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Total U.S. retail sales of musical instruments and related products increased nearly eight percent in 1985, to $2.7 billion.

A major factor contributing to this increase was a sharp rise in the demand by consumers for electronic musical instruments and accessories. Sales of electronics totaled nearly $1.2 billion, up twenty-eight percent over 1984. Electronic keyboards were particularly strong sellers, with total retail dollars at $533.6 million, an increase of forty-one percent over the previous year. Leading the electronic keyboard categories in dollar increases were electric pianos and electronic keyboards which more than doubled in retail dollars in 1985, followed by portable keyboards up thirty-one percent, and synthesizers which rose twenty-seven percent in retail dollars.

Technological advancements in electronic instruments brought down the prices of several keyboard products and made new features available which attracted large numbers of first-time and "step-up" buyers. In addition, a growing acceptance of musical instrument digital interface (MIDI) spurred purchases of multiple electronic keyboard units by individual customers.

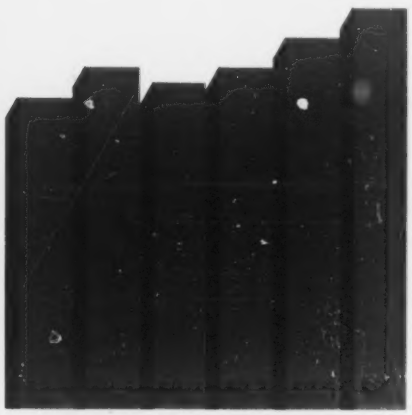
In general, consumers tended to purchase good quality products of all kinds, both at the low and high ends of the price spectrum. This was particularly true of traditional pianos and organs, for which average per-unit retail prices increased nine percent and five percent, respectively, over 1984.

The stabilization of demand in the traditional musical instrument markets (such as pianos, woodwinds, brass and fretted instruments) and the explosive growth in newer electronic instruments bode well for the music industry during 1986.

It seems apparent that American's love of music-making continues to be strong and that the U.S. music industry will continue to respond to, and nurture, this love.

1985 RETAIL SALES OF NEW MUSICAL INSTRUMENTS, SHEET MUSIC AND MUSICAL ACCESSORIES UP 8 PERCENT TO $2.7 BILLION

RETAIL SALES
1980-1985
(Billions)



	Music Industry Retail Sales	Personal Consumption	% of Personal Consumption[3]	Gross National Product	Cost Living Index
		(Billions)		(Billions)	1967=100
1985	$2,694,900,000	$2,582.1	0.104%	$3,989.1	322.2
1984	2,496,333,000[5]	2,342.3	0.107%	3,661.3	311.1
1983	2,346,247,000	2,157.0	0.109%	3,310.8	298.4
1982	2,207,745,000	1,971.1	0.112%	3,059.3	289.1
1981	2,375,610,000[4]	1,857.8	0.128%	2,924.8	272.4
1980	2,180,800,000	1,672.8	0.130%	2,626.1	246.8
1979	2,353,609,000	1,509.8	0.156%	2,368.8	217.4
1978	2,299,690,000	1,340.1	0.172%	2,107.6	195.4
1977	2,090,204,000	1,260.2	0.166%	1,963.7	181.5
1976	1,919,010,000	1,079.7	0.178%	1,691.6	170.5
1975	1,741,977,000	963.8	0.180%	1,498.9	161.2
1974	1,821,353,000	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000[1]	804.0	0.189%	1,289.1	133.1
1972	1,306,179,000[2]	721.0	0.181%	1,151.8	125.3
1971	1,106,339,000	662.1	0.167%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	954,138,000	536.6	0.177%	865.7	104.2
1967	924,000,000	491.7	0.187%	785.0	100.0
1966	955,000,000	469.9	0.205%	739.6	97.2
1965	887,000,000	428.7	0.206%	676.3	94.5
1964	731,000,000	398.9	0.183%	628.7	92.9
1963	661,000,000	373.8	0.177%	589.2	91.7
1962	608,000,000	355.1	0.170%	500.3	90.6
1961	538,000,000	335.1	0.160%	520.1	89.6
1960	500,000,000	325.2	0.154%	503.8	88.7
1959	490,000,000	311.2	0.157%	483.7	87.3
1958	441,000,000	290.1	0.152%	447.3	86.6
1957	438,000,000	281.4	0.156%	441.1	84.3
1955	380,000,000	254.4	0.150%	398.0	80.2
1950	235,000,000	191.0	0.124%	284.8	72.1
1949	220,000,000	176.8	0.124%	256.5	71.4
1941	90,000,000	80.6	0.111%	124.5	44.1

1. *For comparable figure in 1972, add $8,000,000 for non-reporting piano manufacturers previously not recorded, and $21,881,000 for higher sheet music sales. Includes a new category – synthesizers.*
2. *Includes a new category – electric pianos.*
3. *To be read as a fraction of 1%.*
4. *Includes a new category – portable keyboards – plus revised estimates for several categories.*
5. *Figure adjusted to reflect final printed music data from survey results not available at 1984 press time and more accurate reporting in the fretted instrument category.*

Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

How to Read the Data

All figures in this annual review are estimated sales at retail, based on manufacturers' shipments. Imports, and in some cases exports, are included where noted.

The total retail sales figure ($2.695 billion) represents sales in large part through music stores, as well as through some mass merchandisers, major audio chains, direct mail companies, department stores, and direct to consumers through manufacturers, publishers or distributors.

The accuracy of these figures varies widely depending on the availability of a reporting mechanism, the nature of the mix of U.S. made instruments and imports, and whether the category consists of mostly imported instruments that may or may not be correctly classified by the U.S Customs Department. In all cases these statistics reflect U.S. Tariff Commission figures as they appear on the import page of this report.

Sales estimates rest on the assumption that what has been imported or manufactured domestically and shipped to retailers has also been sold through to consumers in each year.

Analysts using this data should make note of this assumption and give it appropriate weight in making projections. Clearly some inventory is always carried over from year to year.

The three percent difference between sales reported by retailers participating in NAMM's ongoing survey and AMC's total sales estimate, which is based on manufacturers' shipments, can be attributed (at least in part) to the build-up of inventory by retailers during 1985.

Only two categories in this review are based on an organized but voluntary reporting system, and even within these categories (pianos and organs) estimates have been made for manufacturers who do not report their sales. Government reporting categories for all imported electronic keyboards are unclear, and therefore, determining the exact number of units that properly belong in the organ category, as opposed to portable and other electronic keyboards, continues to be a particular challenge.

In the category of printed music, figures are based on best estimates of experts in this segment of the industry. A 1985 survey by the National Music Publishers Association was not completed in time for inclusion in this report. (It should also be noted that the 1984 figure for printed music has been revised to reflect results of the NMPA survey which were not available at last year's press time.)

Wind instruments, percussion and string data have been analyzed by industry experts who have tracked both domestic manufacture and imports.

In all other categories, retail sales are based on estimates calculated by combining an average retail value for American made instruments with an average value of imports, where applicable.

In categories where there are no applicable import schedules and no reporting system, a representative number of manufacturers have been interviewed to try to arrive at a consensus on the size of the market.

This review omits several manufacturing areas for which it is extremely difficult to compile any data, including kits for assembly of instruments, harps, a variety of inexpensive instruments used in elementary education, musical toys, and estimates for craft production other than for bowed strings. There is also a brisk market for used or rental instruments which AMC does not follow.

Imports/Exports

Imports are figured into all relevant categories; exports are included only where indicated.

Determining the exact number of units made and sold domestically is becoming more complex each year due to the changing nature of imports. For example, some foreign manufacturers are shipping parts from abroad and assembling in the United States, some have built plants here. Government reporting categories, amplified in 1983, still are inadequate to provide a clear view of exactly what types of electronic instruments are being shipped to the U.S.

The data that appears in this statistical review represents three months of intensive discussions and work with a great many music industry experts. I would like to thank all of those men and women for their help, the insights they provided, and the time they have devoted to helping compile this information.

Paul Bjorneberg
Editor

STATISTICAL INFORMATION

Pianos

Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Total units of pianos sold in 1985 were down 16 percent and dollar value dropped 9 percent. High-priced vertical and grand pianos were reported to have sold well, while there was a continued decline in lower-priced spinet and console sales. Sales were sluggish in the beginning of 1985, but the fourth quarter was strong, according to industry experts.

Sales of Pianos

	Units	Dollars[1]
1985	151,300	$480,690
1984	180,000	526,100
1983	197,000	454,345
1982	203,000	421,682
1981	231,000	458,304
1980	233,000	424,060
1979	275,600	452,000
1978	282,172	411,971
1977	258,918	345,914
1976	246,235	303,608
1975	217,329	260,795
1974	248,405	273,246
1973	247,701	239,179
1972	232,507	208,924
1970	193,814	164,000
1965	245,600	189,000
1960	198,200	148,650
1950	172,531	125,000
1940	136,332	95,000

[1]*In thousands of dollars.*
Source: National Piano Manufacturers Association and industry estimates.

Organs

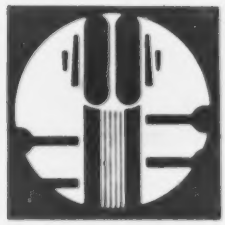
Includes: Domestic production and imports with retail value of $1,000 and up. Exports are not included.

During 1985, the number of organs (with two or more manual keyboards and pedals) is estimated to have dropped 14 percent, while total dollars were down 10 percent. The biggest decline was reported in lower-priced units as consumers shifted buying patterns to single manual electronic keyboards. Higher-priced units were reported to have sold well. Despite a continued decline in the number of units sold, many organ retail experts continue to report that business is good when the product is actively and properly promoted.

Sales of Organs

	Units	Dollars[1]
1985	49,600	$156,300
1984	58,000	174,000
1983	88,000	257,000
1982	101,000	249,000
1981	131,329	323,463
1980	138,724	339,000
1979	175,159	398,487
1978	199,654	478,770
1977	222,400	510,186
1976	217,267	462,779
1975	205,772	395,700
1974	233,845	424,896
1973	202,275	358,836
1972	186,000	314,340
1970	137,500	215,400
1965	143,000	180,600
1960	106,000	141,400
1950	10,000	14,000
1940	NA	NA

[1]*In thousands of dollars.*
Source: National Association of Electronic Organ Manufacturers, U.S. Tariff Commission and industry estimates.



String Instruments

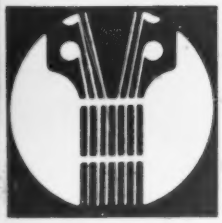
Includes: Imports and domestic production of violins, violas, cellos and basses.

Although both units and dollar value of stringed instruments—most of which are imported—fell in 1985, industry experts reported this does not reflect a decline in school string instruction programs. Reasons cited for the decreases include a 54 percent drop in the number of inexpensive units shipped from China (which accounted for nearly a quarter of all units imported in 1984), carry-over of inventory from the previous year, and growing numbers of rental/lease programs. Domestic manufacturers reported an increase in business during 1985.

Sales of String Instruments

	Units	Dollars[1]
1985	70,000	$26,138
1984	97,500	32,318
1983	93,000	30,000
1982	120,000	38,200
1981	109,500	36,300
1980	94,000	38,000
1979	92,000	39,330
1978	83,500	36,500
1977	75,000	25,200
1976	83,000	25,400
1975	91,225	28,000
1974	63,655	19,466
1973	54,866	15,252
1972	61,565	12,559
1970	75,700	19,720
1965	64,000	13,400
1960	40,600	7,300
1950	NA	NA
1940	NA	NA

[1]*In thousands of dollars.*
Source: U.S. Tariff Commission with adjustment made for domestic production.



Fretted Instruments

Includes: Domestic production and imports. Exports are not included.

Total fretted instruments sold in the U.S. in 1985 were up 6 percent in units and 15 percent in total retail value. Domestic production rose 5 percent in units and 15 percent in total value. Industry experts cited the music video explosion, continued popularity of rock 'n roll and heavy metal music, and increasing numbers of first-time players entering the market as reasons for the increases. Domestic manufacturers also noted a growing consumer trend toward acoustic guitars. Imports of electric guitars rose 31 percent over 1984, while estimated value was up 39 percent. Overall, imports showed gains of 6 percent in units and 15 percent in total retail value.

Sales of Fretted Instruments

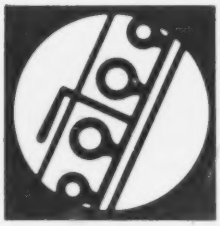
	Units	Dollars[1]
1985	1,056,152	$271,636
1984	994,607	236,000[4]
1983	875,106	214,500
1982	1,213,138	252,805
1981	1,332,550	320,417[3]
1980	1,102,041	226,402
1979	1,890,006	301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1974	2,291,212	254,150
1973	2,048,053	208,446
1972	2,541,480	190,914
1970[2]	2,214,686	159,910
1965[2]	1,500,000	140,000
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

[1]In thousands of dollars.
Source: U.S. Tariff Commission and industry estimates.
[2]These years also include estimates of amplifier and P.A. system sales.
[3]Reflects more accurate reporting and figures for several smaller guitar manufacturers.
[4]Figure adjusted upward from $227 million to reflect more accurate reporting.

Sales of Fretted Instruments

	1985		1984		1983	
Domestic	**Units**	**Dollars**	**Units**	**Dollars**	**Units**	**Dollars**
Includes Non-electric guitars, Electric guitars and other fretted inst.[1]						
Domestic Total ($ rounded)	138,200	$ 92,761,000	131,000	$ 81,000,000[3]	163,000	$ 93,000,000
Imports						
Non-electric guitars	440,253	$ 57,900,000	495,535	$ 66,000,000	457,485	$ 63,000,000
Electric guitars	373,339	112,700,000	285,262	81,000,000	170,847	49,500,000
Other fretted[2]	104,360	8,275,000	82,810	8,000,000	83,774	9,000,000
Import Total ($ rounded)	917,952	$178,875,000	863,607	$155,000,000	712,106	$121,500,000
Grand Total ($ rounded)	1,056,152	$271,636,000	994,607	$236,000,000[3]	875,106	$214,500,000

[1]Includes domestic production of acoustic and electric guitars and banjos, ukuleles and mandolins.
[2]Includes banjos, ukuleles and mandolins.
[3]Figure adjusted upward from $72 million to reflect more accurate reporting.

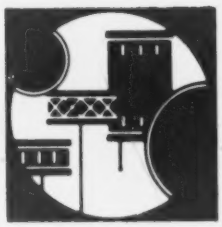


Woodwind Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.

Brass Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.



Percussion

Includes: Domestic production of drums sold in sets, as marching band equipment; mallet instruments, and cymbals. Imports are included and exports are not.

Brass instruments rose slightly both in units and retail value during 1985, with imports accounting for approximately 18 percent of all units. Woodwinds were up 2 percent in units over the previous year and 4 percent in value. Imports accounted for 20 percent of all woodwind units.

Sales of Band Instruments
A. WOODWINDS (clarinets, saxophones, oboes, flutes, etc.)

	Units	Dollars[1]
1985	309,800	$141,390
1984	303,000	136,071
1983	326,000	142,055
1982	343,000	142,345
1981	345,000	135,515
1980	321,000	117,000
1979	328,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	343,245	96,452
1975	359,000	94,417
1974	402,645	102,674
1973	353,000	85,073
1972	329,207	76,972
1970	304,000	66,150
1965	322,000	61,000
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

[1]*In thousands of dollars. Source: Industry estimates*

Sales of Band Instruments
B. BRASS (trumpets, trombones, French horns, baritones, tubas, sousaphones, etc.)

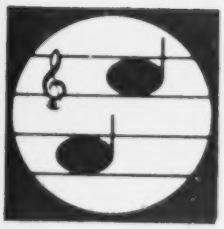
	Units	Dollars[1]
1985	144,600	$67,600
1984	143,000	65,544
1983	165,000	73,347
1982	168,000	71,064
1981	201,500	81,205
1980	197,000	74,800
1979	220,000	80,300
1978	229,000	76,715
1977	234,060	72,692
1976	238,600	70,000
1975	253,000	69,322
1974	267,360	71,118
1973	254,000	63,754
1972	219,800	53,666
1970	225,000	51,000
1965	230,000	44,000
1960	153,000	29,700
1950	85,000	13,000
1940	75,000	6,000

Total sales volume for percussion instruments was up slightly over 1984. The number of first-time amateur players entering the market was stable and the demand for marching band equipment was off slightly, according to industry experts.

Sales of Drums

	Units	Dollars[1]
1985	NA	$83,000
1984	NA	82,000
1983	NA	78,000
1982	NA	78,475
1981	NA	82,914
1980	NA	69,017
1979	NA	70,426
1978	NA	61,240
1977	NA	56,700
1976	NA	53,000
1975	NA	48,361
1974	NA	57,761
1973	NA	48,134
1972	NA	41,856
1970	NA	32,000
1965	NA	50,000
1960	NA	12,000
1950	NA	NA
1940	NA	NA

[1]*In thousands of dollars.*
Source: Industry estimates.
Unit figures unavailable since drums sold in sets.



Printed Music

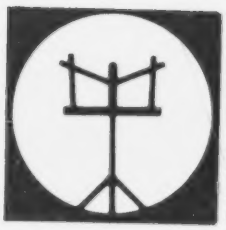
Includes: Domestic publishing of sheet music and self-instruction aids.

Sustained activity in school choral and instrumental music programs and the rising popularity of evangelical choral music contributed to the nearly two percent increase in this category during 1985. It should be noted that the 1984 total dollar figure has been adjusted upward by $13.8 million to reflect the final results of a survey of members of the National Music Publishers, Church Music Publishers, and Music Publishers associations not available at MUSIC USA press time last year.

Sales of Printed Music

	Dollars[1]
1985	$272,000
1984	266,800[2]
1983	253,000
1982	239,112
1981	236,900
1980	266,220
1979	261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1974	175,000
1973	152,984
1972	129,101
1970	91,500
1967	72,000

[1]In thousands of dollars. 1981–1983 data from a new survey sponsored by National Music Publishers' Assoc., Church Music Publishers' Assoc., and Music Publishers' Assoc. of the U.S.
[2]Figure adjusted upward from $253 million to reflect final data from survey of NMPA, MPA, and CMPA members not available at 1984 press time.



Accessories

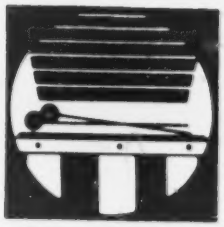
Includes: Estimates for retail sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

Sales of accessories rose four percent over the previous year. Industry experts reported that sales of electronic and percussion accessories were strong and that guitar strings were up an estimated five percent over 1984.

Sales of Accessories

	Dollars[1]
1985	$208,000
1984	200,000
1983	198,000
1982	194,000
1981	194,500[2]
1980	247,000
1979	247,000
1978	236,000
1977	225,000
1976	217,967
1975	198,152
1974	183,474
1973	152,895
1972	132,953
1970	108,400
1967	85,000

[1]In thousands of dollars.
Source: Industry estimates
[2]Nearly $18 million of electronic accessories now included in "P.A. Systems and Components," and $15 million of cymbals moved to "Percussion" category.



Miscellaneous Other Instruments

Includes: Imports of drums and other percussion instruments, electronic instruments such as rhythm machines, cymbals, mouth organs, pipe organs, harpsichords, accordions, hand held keyboards, organs valued under $400, and a variety of educational instruments.

Nineteen different types of instruments are included in this category, all of them imported. Contributing to the 27 percent increase in total dollars were electronic instruments, including hand-held keyboards and organs valued under $400 (up 71 percent from 1984), and drums, cymbals and other percussion instruments (up 21 percent from 1984). Combined, these instruments accounted for 67 percent of the total dollar value for this category in 1985.

Sales of Miscellaneous Other Instruments

	Dollars[1]
1985	$211,161
1984	166,000
1983	151,000
1982	80,000
1981	133,888
1980	124,000
1979	136,600
1978[2]	151,000
1977[2]	91,000
1976	84,258
1975	100,887
1974	106,628
1973	107,072
1972	92,146
1970	78,509
1967	53,800

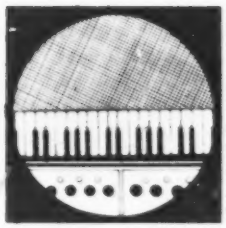
[1]In thousands of dollars.
Source: U.S. Tariff Commission.
[2]Includes $7,000,000 in 1978 and $6,000,000 in 1977 for accordions and concertinas.

Electronics Pass $1 Billion Mark

Estimated retail sales of electronic keyboards and related electronic equipment were more than $933 million during 1985, an increase of 14 percent. With the addition of electric guitars and electronic accessories, that total was slightly more than $1.145 billion representing approximately 43 percent of all instrument and instrument-related sales at retail, as compared to 38 percent during 1984.

While the categories in U.S. Tariff Commission data still leave us with a confusing picture of keyboard imports, their retail value was estimated at nearly $423 million during 1985.

The line that separates one type of electronic keyboard from another is still very blurred and therefore somewhat artificial as the most sophisticated digital technology is being adapted for organs as well as synthesizers.



Portable Keyboards

Includes: Imported keyboards with organ, synthesizer, or even electric piano characteristics that sell from under $100 to $1,000.

Strong consumer demand and expanded distribution through outlets such as major audio chains and mass merchandisers, were reasons cited by industry experts for portable keyboard sales more than doubling in 1985. Approximately 81 percent of all units were imported from Japan. This year, for the first time, the following average-unit retail price point breakouts are provided to identify distribution channels (over $300 up to $1,000 for traditional MI dealers, and under $300 for other retailers):

	Units	Value
Under $300:	1,010,500	$155,785,000
Over $300:	290,000	97,500,000
Total:	1,300,500	$253,285,000

Portable Keyboards

	Units	Dollars[1]
1985	1,300,500	$253,285
1984	534,000	193,000
1983	282,000	150,000
1982	NA	98,200
1981	NA	53,900[2]
1980	NA	7,586[3]

[1] *In thousands of dollars.*
[2] *Included in Miscellaneous Other Instruments and in Portable Keyboards in 1981.*
[3] *Included in Miscellaneous Other Instruments in 1980.*

Synthesizers

Includes: Domestic production, imports and exports of keyboard type and drum synthesizers.

Sales of synthesizers rose more than 60 percent in units and 27 percent in total dollars during 1985. Industry experts attributed these increases to technology and price. MIDI-equipped products made the purchase of multiple keyboards attractive. Refinements in existing technology also brought down prices. Imports of keyboard and drum synthesizers accounted for more than four-fifths of the total units.

Sales of Synthesizers

	Units	Dollars[1]
1985	220,000	$173,200
1984	134,700	136,000
1983	66,000	80,000
1982	43,000	50,000
1981	34,500	33,000
1980	36,606	32,300
1979	24,172	24,172
1978	24,050	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973[2]	7,000	8,000

[1] *In thousands of dollars.*
[2] *First year for inclusion of this category. Source: Industry estimates.*

Electric Pianos/ Electronic Keyboards

Includes: Domestic production, imports and exports.

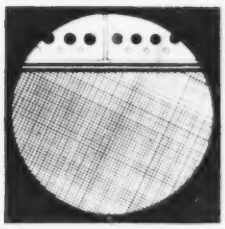
Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

This keyboard category is estimated to have increased 20 percent in units and more than doubled in total value. Higher-priced products with good piano-like sound and actions which were introduced in 1985, were reported to have been strong sellers. (The average retail price per unit increased 79 percent over 1984.) Industry experts also reported that digital technology and products with MIDI capability which enhance the use of these keyboards in school music education helped spur sales. More than 80 percent of all units in this category are imported. Confusion in import classifications makes it difficult to determine how many imports fall into the "piano" segment.

Sales of Electric Pianos/ Electronic Keyboards

	Units	Dollars[1]
1985	60,000	$107,000
1984	50,000	50,000
1983	44,000	44,000
1982	40,000	40,000
1981	37,000	40,700
1980	40,000	40,000
1979	38,737	38,737
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972[2]	15,000	9,000

[1]*In thousands of dollars.*
[2]*First year for inclusion of this category. Source: Industry estimates.*



Sound Reinforcement Equipment

Includes: Domestic production and imports sold through music stores. Exports are not included.

Amplifier sales during 1985 were estimated to have risen two percent, while total dollars were flat. Continuing a long trend, low-priced, small, portable units were strong sellers. P.A. systems and components were up six percent in dollars. The action in this area was toward smaller, lightweight amplifiers and speaker systems capable of accurately reproducing electronic keyboard sounds. Digital reverb and digital delay units sold particularly well, according to industry experts.

Sales of Amplifiers

	Units	Dollars[1]
1985	170,000	$51,500
1984	166,000	51,500
1983	157,000	50,000
1982	177,000	57,500
1981	177,000	63,860
1980	177,000	62,000
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,980	53,592
1972	110,000	43,245
1971[2]	96,000	35,643

[1]*In thousands of dollars.*
[2]*Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*

Sales of P.A. Systems and Components

(mikes, mixers, power amplifiers, speaker systems and components, signal processors)

	Units	Dollars[1]
1985	NA	$192,000
1984	NA	181,000
1983	NA	171,000
1982	NA	157,500
1981	NA	175,000[3]
1980	NA	121,000[4]
1979	NA	121,000
1978	NA	108,000
1977	NA	100,000
1976	NA	60,000
1975	71,000	53,000
1974	60,000	45,000
1973	18,900	11,246
1972	18,000	10,318
1971[2]	16,000	9,903

[1]*In thousands of dollars.*
[2]*Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*
[3]*Includes $18 million of electronic devices previously included in the "Accessories" category.*
[4]*Low estimate according to industry sources.*

1985 IMPORTS SHOW 35% GAIN; EXPORTS DROP 11%

Imports of traditional and electronic instruments, parts and accessories in 1985 increased 35 percent over the previous year, reaching nearly $450.3 million, while U.S. exports dropped 11 percent to $92.9 million, according to the American Music Conference's annual analysis of U.S. Department of Commerce import/export data.

Leading the increases in imports were electronic instruments, registering an 82 percent gain over 1984. Electric guitars, organs and keyboards, synthesizers, hand-held keyboards and other electronic instruments, combined, were valued at approximately $208 million, representing nearly 42 percent of all imports.

During the past five years electronic instrument imports have surged ahead 890% in total value, from slightly more than $21 million in 1980, to the current-year figure of $208 million. Total imports during that five-year period have increased by 167 percent.

Overseas shipments of U.S. musical products between 1980 and 1985, on the other hand, have dropped 56 percent; falling from a total value of nearly $202 million in 1980, to $92.9 million in 1985.

The strong U.S. dollar abroad and the fact that some American companies are manufacturing overseas for shipment to this country were factors contributing to the overall 1985 import/export picture, according to industry experts.

U.S. IMPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1985 Units	1985 Value	1984 Units	1984 Value	1983 Units	1983 Value	1985 Leading Sources
Pianos	56,822	$94,333,453	46,262	$79,514,516	40,274	$60,784,672	Japan/Korea
Violins, Violas, Cellos, Basses	68,419	4,193,493	94,642	5,260,592	89,649	4,783,064	West Germany/Japan
Guitars, Nonamplified	440,253	14,474,467	495,535	15,549,506	457,485	13,939,970	Taiwan/Korea/Japan
Other Stringed Musical Instruments[1]	104,360	2,068,772	82,810	1,942,563	83,774	2,107,509	Taiwan/Korea
Strings for Musical Instruments	N/A	2,582,214	N/A	2,920,883	N/A	2,486,172	United Kingdom/ West Germany
Pipe Organs	144	6,022,738	84	3,449,560	90	5,332,786	Canada
Organs (Except Pipe & Electric)	77,830	2,047,275	117,786	2,470,479	69,358	1,286,669	Italy
Accordions, Concertinas	10,130	1,521,769	7,763	1,465,810	8,010	1,384,142	West Germany/Italy
Mouth Organs[2]	220,252	1,945,165	129,049	2,021,238	164,357	2,745,542	West Germany
Brasswind Musical Instruments[3]	26,647	5,257,468	24,131	4,975,168	24,089	4,159,930	Japan/ United Kingdom
Clarinets	26,452	3,672,809	14,744	2,380,517	13,910	2,193,222	France/West Germany
Saxophones	18,171	4,916,580	18,450	4,645,230	12,991	3,029,364	Japan/Taiwan
Other Wind Instruments[4]	781,295	4,917,054	710,994	4,455,971	787,570	4,115,195	Japan
Percussion Musical Instruments[5]	N/A	19,470,202	N/A	16,144,189	N/A	15,349,415	Japan/Taiwan
Electronic Organs[6] (Two Keyboards)	24,079	11,664,688	45,578	8,509,512	29,715	4,007,871	Italy/Japan
Electronic Keyboards (One Keyboard)	1,331,042	98,825,359	534,203	48,386,765	260,648	30,874,306	Japan
Music Synthesizers (With Keyboards)	176,787	40,752,578	75,672	22,832,601	62,734	16,777,350	Japan
Other Electronic Musical Instruments[7]	217,347	21,579,862	112,995	13,695,663	131,996	9,513,477	Japan
Hand Held Electronic Instruments	171,052	6,985,478	56,639	1,645,978	15,634	1,118,924	Japan
Electronic Fretted Instruments	373,339	28,176,067	285,262	19,011,480	170,847	11,390,736	Japan/Korea
Accessories[8]	N/A	20,996,434	N/A	19,449,686	N/A	17,464,795	Japan/Taiwan
Parts for Musical Instruments	N/A	49,745,334	N/A	50,976,087	N/A	45,661,200	West Germany/Mexico/ Japan
Harpsichords and Clavichords	14,004	4,145,360	4,687	2,471,519	1,641	2,281,893	Japan
TOTALS		$450,294,619		$334,175,513		$262,563,186	

Source: U.S. Department of Commerce, Bureau of Census, Foreign Trade Division. [1]*Includes banjos, ukuleles and other fretted instruments.* [2]*All totals are in dozens.* [3]*Over $10 in value.* [4]*Includes flutes, oboes, English horns, etc.* [5]*Includes cymbals, drums, marimbas, triangles, etc.* [6]*Keyboard instruments with more than one keyboard.* [7]*Includes any instrument that requires amplification, such as drum and rhythm machines.* [8]*Includes mutes, accessories for drums and cymbals, lyres, music stands, cases for instruments, metronomes, pitch pipes, tuning forks and tuning hammers.*

Imports

Imports of electronic keyboards were up 149 percent in units valued at $98.8 million; an increase of 104 percent over 1984. Ninty-eight percent of all units in this category were shipped from Japan.

Hand-held electronic keyboards were reported at 171,000 units—up 202 percent from 1984. Japan shipped nearly 152,000 units (up 193 percent from 1984) at a total value of $5.6 million.

Electric guitars rose 31 percent in units with a total value of slightly more than $28 million; a 48 percent increase from the previous year. Imports of non-amplified guitars dropped 11 percent in units and 7 percent in total value.

The number of imported pianos rose to nearly 57,000 units with a value of slightly more than $94 million. Japanese and Korean pianos accounted for 93 percent of all units shipped from abroad. As a part of this overall category, grand piano shipments increased 19 percent to 23,141 units and 17 percent in total value to nearly $60 million.

A 32 percent drop in the number of inexpensive organs from Italy contributed to this category's 34 percent decrease in units and 17 percent drop in total value.

In other import categories: brasswind instruments were up 10 percent in units and 6 percent in value; clarinets jumped 79 percent to 26,452 units; percussion instruments moved ahead 21 percent in total value.

Exports

Exports in the synthesizer/electric piano category increased in both units and value during 1985. Units were up 21 percent and total value rose 17 percent to nearly $1.6 million.

Other plucked and bowed string instruments was the only other export category showing gains in both units and value.

Two export categories showing increases in total value were other electronic musical instruments, up 12 percent and parts (other than piano and organ), cases and accessories, up 1 percent.

All other export categories registered decreases compared to the previous year.

U.S. EXPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1985 Units	1985 Value	1984 Units	1984 Value	1983 Units	1983 Value	1985 Leading Customers
Pianos	3,813	$ 4,761,742	5,659	$ 6,194,404	9,035	$9,574,493	Canada
Guitars	7,332	2,595,527	10,640	3,236,643	12,153	3,932,644	Japan
Electric Guitars	7,614	1,977,966	19,905	4,216,426	23,247	6,306,827	Japan/United Kingdom
Other Plucked and Bowed Strings[1]	40,945	2,877,401	19,925	1,798,596	25,308	2,567,499	Japan
Electronic Organs	4,585	6,033,382	7,092	7,673,145	16,578	12,239,920	Canada
Synthesizers and Electric Pianos	2,330	1,554,789	1,923	1,332,300	1,645	930,352	United Kingdom/ Switzerland/Japan
Other Electronic Musical Instruments	N/A	18,367,402	N/A	16,422,772	N/A	17,689,502	Japan/United Kingdom
Brasswinds	26,958	8,134,660	33,702	9,541,620	42,988	10,647,544	Japan/Germany
Woodwinds	34,365	3,822,326	42,184	4,501,407	42,185	6,097,538	Canada
Percussion Instruments	N/A	6,780,944	N/A	9,696,985	N/A	9,130,259	Japan
Organs, Pipe & Reed	87	167,564	44	255,178	134	340,155	Bahamas
Piano and Organ Parts	N/A	6,560,569	N/A	10,304,151	N/A	12,965,790	Mexico
Other Parts, Cases and Accessories	N/A	28,902,709	N/A	28,545,310	N/A	32,551,536	Japan
Other Musical Instruments[2]	5,822	337,879	8,053	503,756	20,812	858,494	Japan
TOTALS		$92,874,860		$104,222,702		$125,832,553	

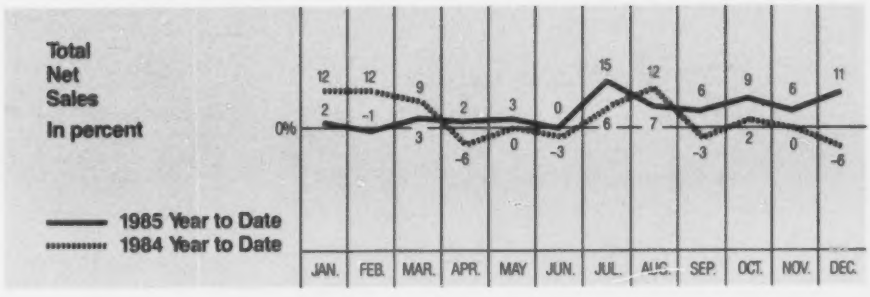
[1]*Includes harps, clavichords, mandolins.* [2]*Includes mouth organs, accordions.*

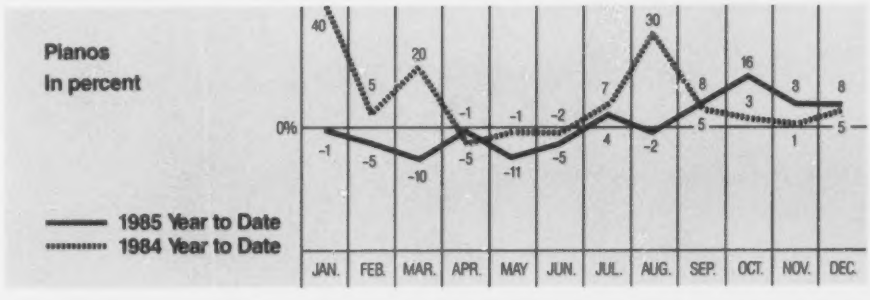
PARTICIPATING RETAILERS REPORT 5 PERCENT INCREASE IN 1985 SALES

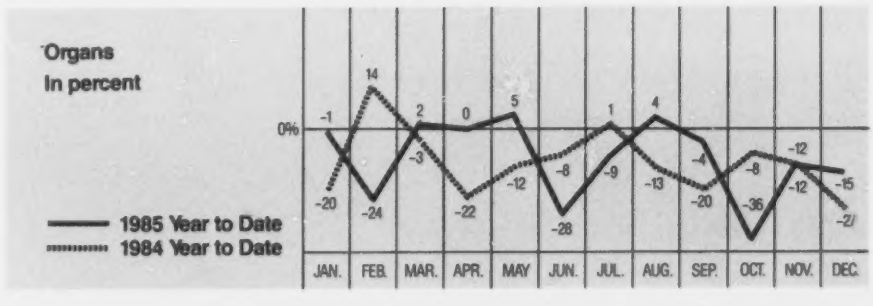
How to Read the Graphs: On each of the following graphs, the base line (0 percent) represents 1982 sales. Solid lines represent the percent of change in 1985 sales over the same month in 1984. Broken lines represent the change in 1984 as compared to the same month in 1983.

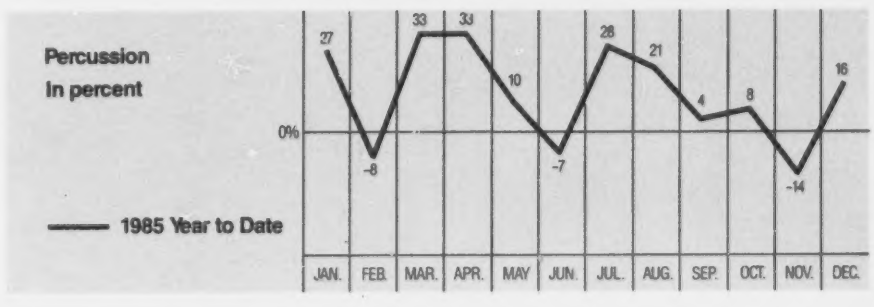
In 1985, a new category of signal processing and effects devices was added. Also, separate categories were assigned to percussion, fretted instruments, and instrument amplifiers, which were previously combined in one category, and sound reinforcement equipment was separated from recording equipment. Therefore, in these five categories, figures for 1984 do not appear on the graphs.

Total net sales volume for the industry includes recording equipment not shown by a separate graph.







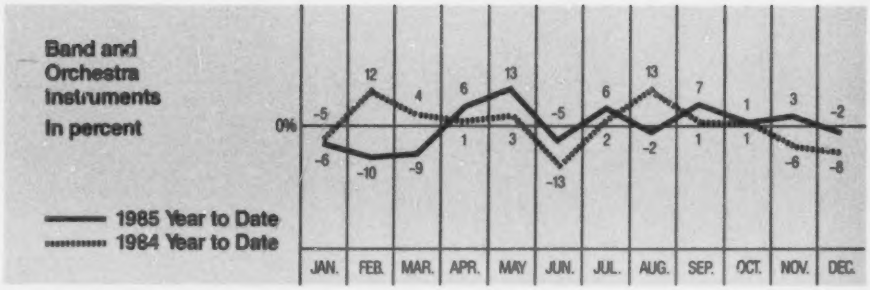


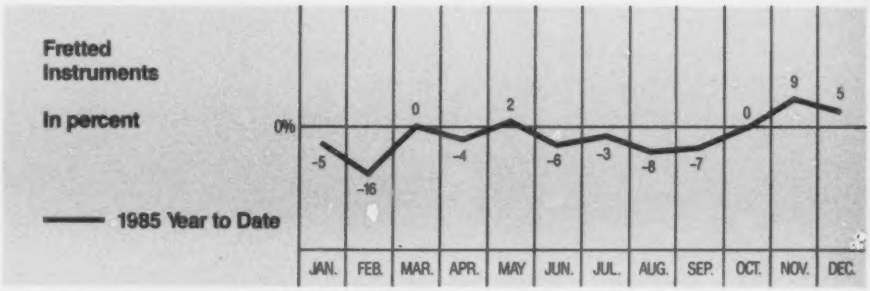
Overall retail sales of musical instruments and accessories during 1985, were five percent above the previous year, as reported by retailers across the country who participate in the National Association of Music Merchants' ongoing survey. Data is analyzed monthly by Industry Insights, Inc., of Columbus, Ohio.[1]

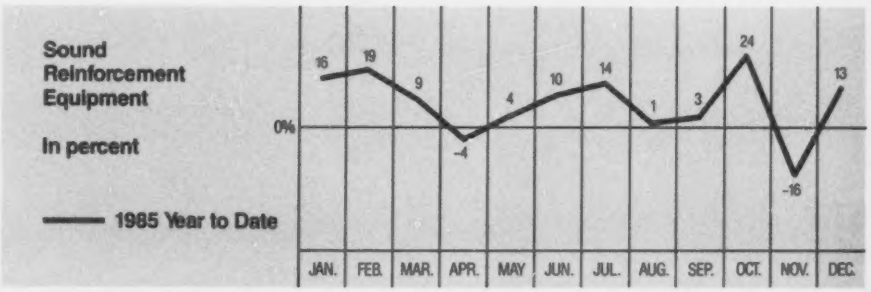
Piano sales were reported 2 percent ahead of 1984; organs registered a 10 percent decrease. Band and orchestra instruments were up 1 percent; sheet music moved ahead 2 percent, and accessories rose 5 percent.

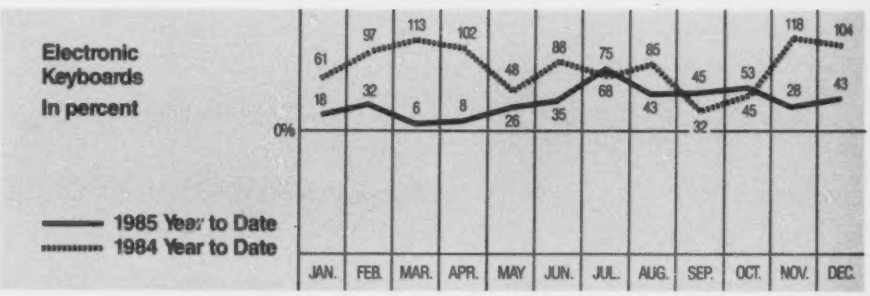
Sales of electronic keyboards jumped 37 percent ahead of 1984, and sound reinforcement equipment grew 9 percent. The signal processing and effects category did not produce enough responses to provide accurate data for December of 1985.

Percussion instruments were up 11 percent; fretted instrument sales dropped 2 percent, and instrument amplifiers rose 3 percent.


Band and Orchestra Instruments
In percent
0%
1985 Year to Date
1984 Year to Date
-5 12 4 6 13 -5 6 13 7 1 3 -2
-6 -10 -9 1 3 -13 2 -2 1 1 -6 -8
JAN. FEB. MAR. APR. MAY JUN. JUL. AUG. SEP. OCT. NOV. DEC.




Sound Reinforcement Equipment
In percent
0%
1985 Year to Date
16 19 9 -4 4 10 14 1 3 24 -16 13
JAN. FEB. MAR. APR. MAY JUN. JUL. AUG. SEP. OCT. NOV. DEC.


Electronic Keyboards
In percent
0%
1985 Year to Date
1984 Year to Date
61 97 113 102 48 86 75 85 45 53 118 104
18 32 6 8 26 35 68 43 32 45 28 43
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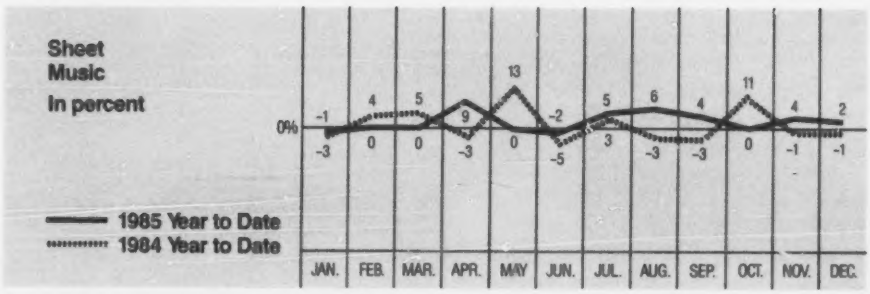
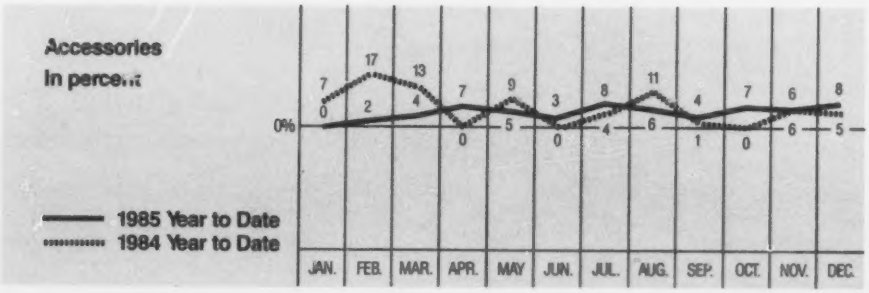
■ RETAIL SALES SHOW GAINS


Sheet Music
In percent
1985 Year to Date
1984 Year to Date
0%
-1 4 5 9 13 -2 5 6 4 11 4 2
-3 0 0 -3 0 -5 3 -3 -3 0 -1 -1
JAN. FEB. MAR. APR. MAY JUN. JUL. AUG. SEP. OCT. NOV. DEC.


Accessories
In percent
1985 Year to Date
1984 Year to Date
0%
7 17 13 7 9 3 8 11 4 7 6 8
0 2 4 0 5 0 4 6 1 0 6 5
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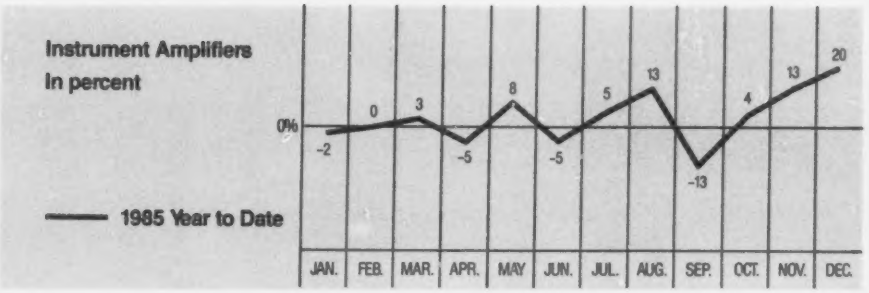

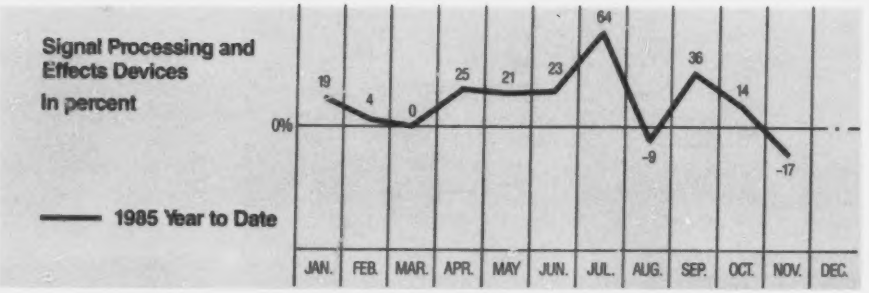
Signal Processing and Effects Devices
In percent
1985 Year to Date
0%
19 4 0 25 21 23 64 -9 36 14 -17
JAN. FEB. MAR. APR. MAY JUN. JUL. AUG. SEP. OCT. NOV. DEC.

[1]*For further information about these charts, contact the National Association of Music Merchants, 5140 Avenida Encinas, Carlsbad, California 92008. Note that dollar information has not been adjusted for inflation.*

U.S. AMATEUR MUSIC PARTICIPATION ESTIMATED AT 57 MILLION

One out of every four Americans—approximately 57 million people[1]—play a musical instrument, according to a 1985 survey conducted for the American Music Conference by The Gallup Organization. This is the largest amateur music figure ever reported by AMC.

The survey reports that 39.3 million[2] households (46% of the total) contain at least one amateur musician. A total of 1,554 adults were polled, nationwide.

In general, musical households have a slightly higher income level ($25,600) than the total population ($23,600). Amateur music makers tend to be younger (under 35 years of age), high school or college-educated adults who live outside central cities.

This is the fifth national amateur music tracking study undertaken by AMC, and the second done by the Gallup Organization and underwritten by the National Association of Music Merchants. AMC's last study was in 1978.

Playing Habits

Seventy-eight percent of all amateur musicians who say they can play an instrument do so regularly or at least six times a year. This represents nearly 45 million Americans.

Piano, guitar and organ are the nation's most popular instruments, capturing the largest numbers of amateur players. Electronic keyboards showed up for the first time in AMC research, with active amateur players projected at 400,000, nationally. Thirty-six percent of all players say they know how to play piano; 24% acoustic guitar; 9% electric guitar, and 12% the organ. In total, these three instruments are played by 80% of all amateurs. Among the other most played instruments are the flute, clarinet, drums, trumpet, violin, and harmonica.

The guitar is most popular among males, while the majority of females play the piano. Men are also more likely to play drums, trumpet or harmonica. More women than men play the organ, flute or clarinet. The median age of piano players is around 30 and for organ players around 40, slightly older than noted in prior studies.

Reviewing the results of research conducted in 1972, 1978 and 1985, some of the key trends in the music industry emerge: between 1972 and 1978, the total population base rose by five percent, but the numbers of amateur music players moved ahead by 47 percent. Between 1978 and 1985, both the population growth and growth in the number of amateurs were about the same.

While the percentage of active amateurs in the population rose six percent between 1972 and 1978, in the last seven years it has remained stable. Among the amateur music population, the percentage of those who say they play regularly has remained at the same level for the past 13 years—at better than three-fourths of the total music-making population.

Forty-six percent of all households surveyed own at least one instrument. Compared to the 1978 survey, this represents essentially no change in the proportion of households owning instruments. Of these musical households, 52% own one instrument (compared to 48% in 1978); 22% own two instruments, and 13% own three.

Purchasing Patterns

Nine percent of the surveyed households had purchased an instrument or related product in the twelve months prior to the survey. Among those purchases, pianos and acoustic guitars headed the list, with about one in four purchasers naming each. Sheet music was bought by 47% of the survey respondents, and guitar picks and strings by 21%. More purchases were made by women (54%) than men. Almost three-fourths of all musical products were

WHAT ALL AMATEURS ARE PLAYING[1]

INSTRUMENT	Number of Amateurs[2]	% Male	% Female	Median Age	% Regular Players[3]	Median Age of Regular Players
Piano	20,600,000	23%	77%	31	80%	29
Guitar	18,900,000	72%	28%	28	83%	28
Organ	6,300,000	37%	63%	40	86%	39
Flute	4,000,000	19%	81%	21	78%	20
Clarinet	4,000,000	36%	64%	22	68%	18
Drums	2,900,000	76%	24%	21	62%	16
Trumpet	2,900,000	84%	16%	20	62%	16
Violin	2,300,000	43%	57%	27	78%	26
Harmonica	1,700,000	87%	13%	42	76%	40
Saxophone	1,100,000	72%	28%	23	82%	24
Electronic Keyboards[4]	600,000	33%	67%	34	67%	33

[1]According to 1985 Gallup Organization survey for the American Music Conference. Figures should be read as number of Americans (five years of age and older) who say they play these instruments—and not an indication of instrument ownership.

[2]Half of all amateur musicians play more than one instrument.

[3]Amateur musicians who play regularly; at least six times a year.

[4]Synthesizers and keyboard with one keyboard, combined.

[1]The Gallup Organization has based this figure on a possible statistical error of 4 percent, i.e. 57 million plus or minus 9 million. The projection is based on 220,178,000 Americans five years of age or older.

[2]Projection based on 85.4 million households, with possible statistical error of 3 percent, i.e. 39 million plus or minus 2.5 million.

bought for players under 35 years of age; thirty-five percent of all purchases were for players 5-17 years of age, and 37% for players 18-34 years old.

Word of mouth recommendation was the most frequently cited reason for buying in a particular music store (22% of all purchasers). Other reasons for selecting a particular retailer were, past experience with the store (18%), the convenience of its location (16%), and whether the store offered the best price (17%).

DEMOGRAPHIC PROFILE OF U.S. AMATEUR MUSICIANS

Sex	All Players
Male	47%
Female	53
Age	
5-17 years	24%
18-34 years	39
35-49 years	18
50 and older	16
Undesignated	3
Median Age: 28	
Annual Household Income	
$35,000 and over	22%
20,000-34,999	30
15,000-19,999	11
10,000-14,999	11
Under 10,000	8
Undesignated	18
Region	
East	23%
Midwest	27
South	28
West	22
City Size	
Central City	27%
Suburb	37
Non-SMSA	36

Participation, Ownership Patterns (1972–1985)

	1972[1]	1978[2]	1985[2]
Number of Amateur Musicians	34,000,000	50,000,000	57,000,000
Percentage of Amateur Players in Total Population	20%	26%	26%
Percentage of Players Who Play Regularly[3]	77%	71%	78%
Percentage of U.S. Households with Players	42%	51%	46%
Percentage of U.S. Households Owning An Instrument	N/A	48%	46%
Population Base	(183,000,000)	(192,000,000)	(220,000,000)

[1] *Based on survey by the National Opinion Research Center.*
[2] *Based on survey by The Gallup Organization, Inc.*
[3] *At least six times a year.*

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